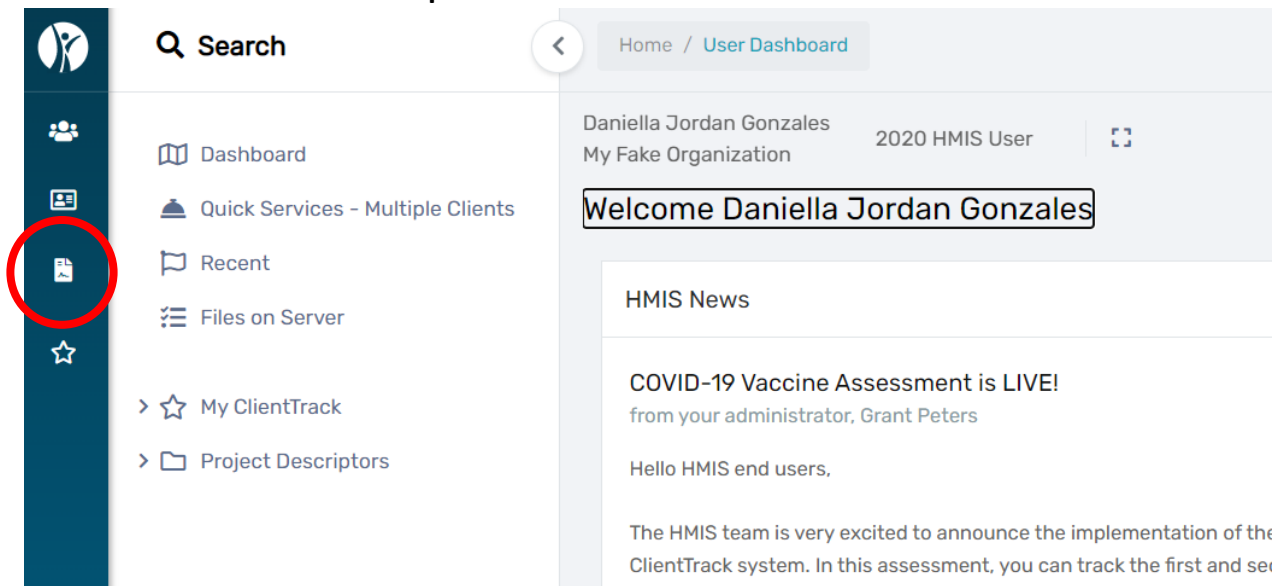


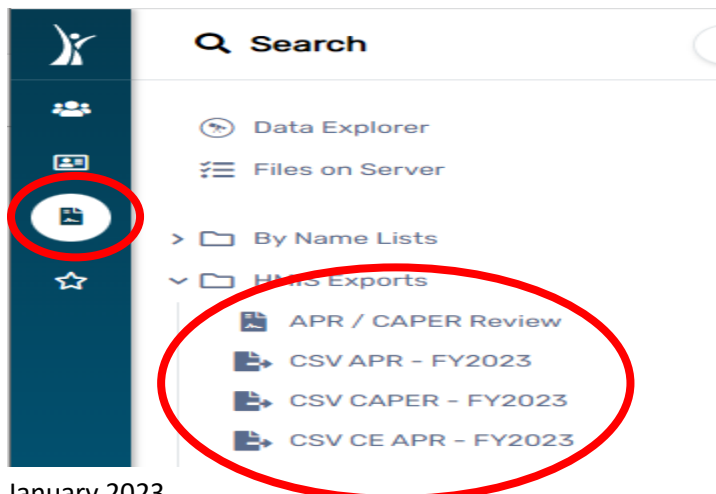
How to Run/Export the Consolidated Annual Performance & Evaluation Report (CAPER) or Annual Performance Report (APR) in HMIS/DV ClientTrack

Running the Export

1. Login under “**2020 HMIS User**” and click on the file icon on the left-hand side menu as shown below to access the “**Reports**”.



2. Once in the “Reports” screen, **click HMIS Exports** from the white left-hand side menu as shown below. Make sure the white left-side menu is expanded by clicking on the back arrow at the top. A drop-down menu will appear. Select “**CSV APR -2023**” or “**CSV CAPER – 2023**” as shown below.



Setting Export Parameters

1. Set up the export parameters by entering the date range with a predefined option in the drop-down list or enter the date range in the **“Begin Date”** field. Your organization will auto populate.

CSV CAPER - HMIS 2022 Standard - FY2023 v1.2

Saved Report Settings: -- SELECT --

Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Date Range List: Since This Date, Last Year

Begin Date: 01/27/2022 to 01/27/2023

Organization

Indicate which organizations should be included in the report by selecting each organization separately, or click the ☒ icon to select all. *Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the export.*

Organization: ☒ A Better Way
☒ A Mother's Hope
☒ Advantage Housing Inc
☒ AIDS Ministries Elkhart
☒ AIDS Resource Group Evansville

2. Leave the **“Filter by Grant(s)”** field blank as this does not work properly and will cause issues when running the report.
3. Select the **“Project Type”** and **“Project (Name)”** for the export. Also select **“Generate Validation File”** by clicking on the checkbox. A check mark should appear when this option is selected successfully.

CSV CAPER - HMIS 2022 Standard - FY2023 v1.2

Grant(s)

This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the ☒ icon to select all. Use the Grants filter to narrow down the list of projects for your export.

Grant(s): ☐ Filter by Grant(s)

Project

A list of projects based on the grant selected.

Project Type: ☐ Filter by Project Type

Project(s): ☐ Filter by Project(s)

- Click on **“Run Export”** in the bottom right-hand corner to begin the data export for your program.

Accessing Export Files & Report Preparation

- An **“Export Encryption”** window will appear where you set the **“Password”** to protect the files. Enter a password and click **“Done”** to continue with the export.

Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export: ☒

Password: *

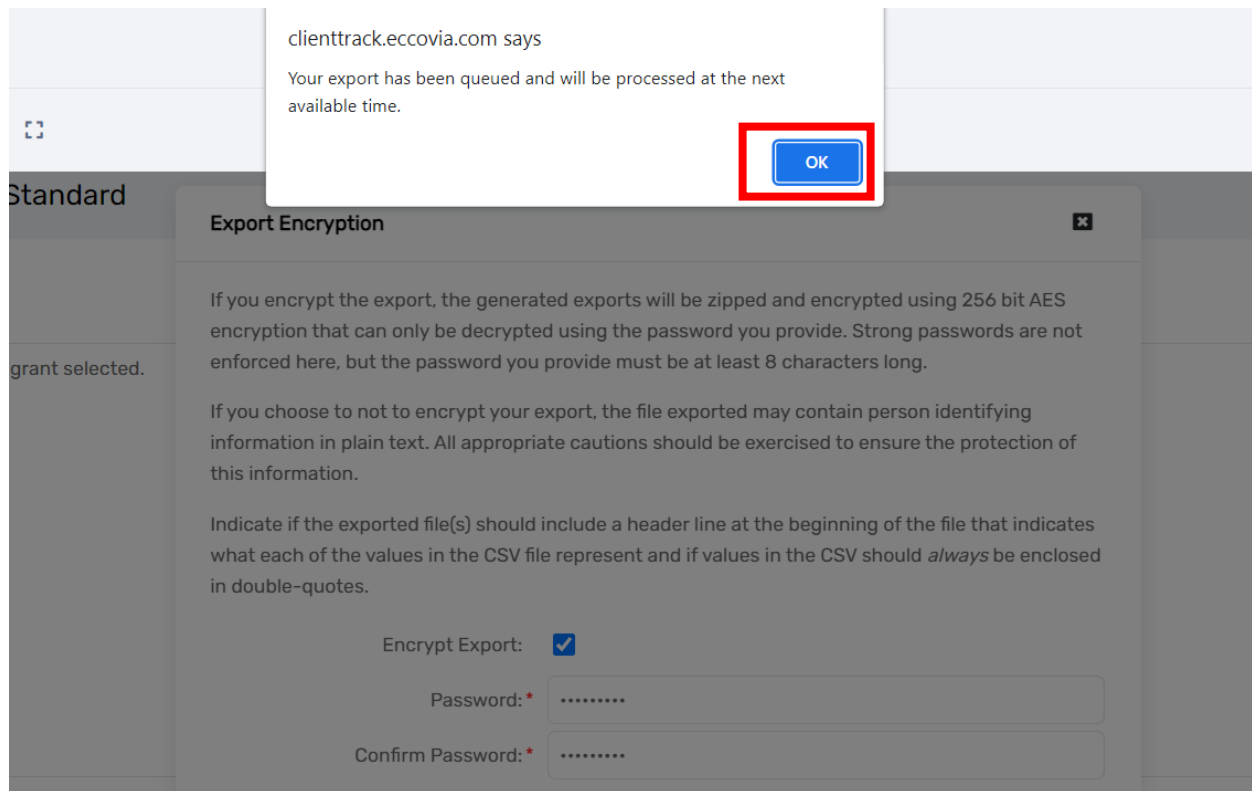
Confirm Password: *

Include Header Row in CSV File(s): ☒

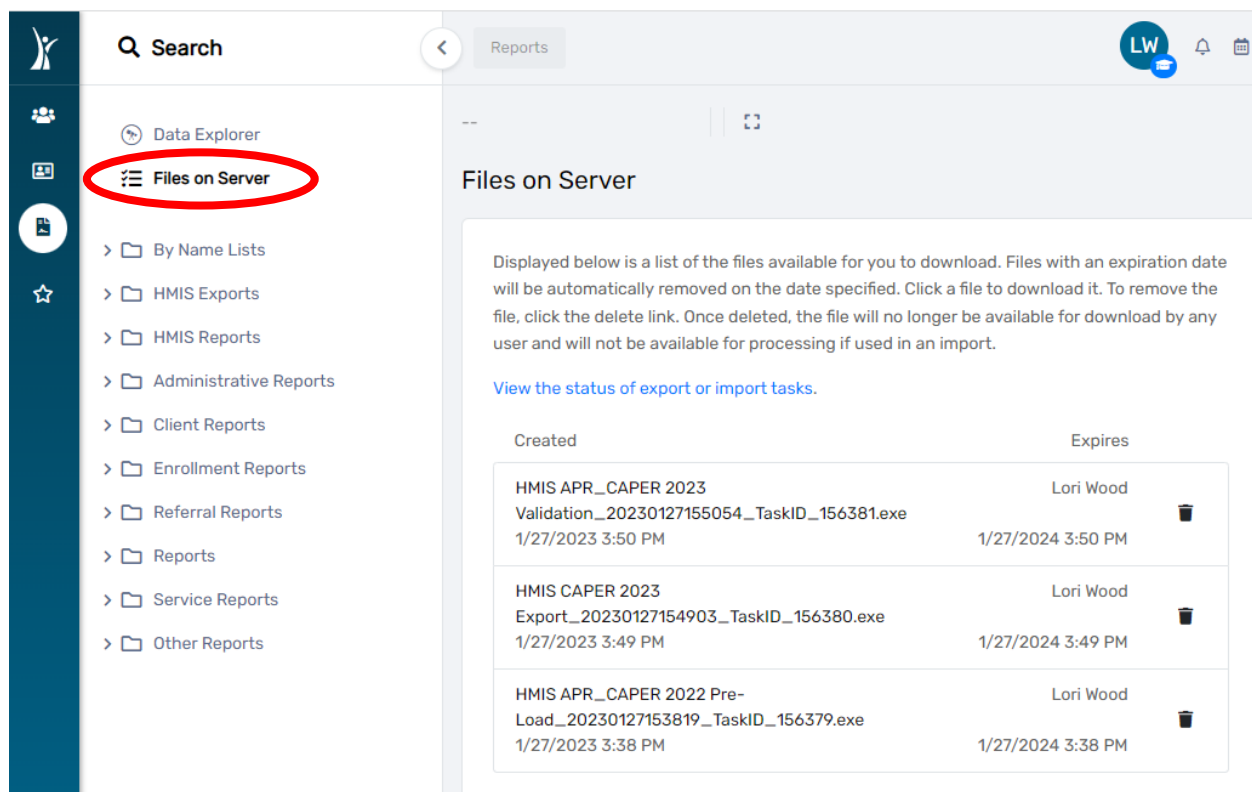
Always Quote CSV Values(s): ☐

Done

- A pop-up will appear **“Your export has been queued and will be processed at the next available time.”** Click **“OK”**



7. **NOTE:** It takes approximately 20 – 30 minutes for the report to load. To check the status of your report, click **“Files on Server”** as shown in the image below



8. The report is ready once three separate files are displayed as indicated in the screenshot below. The following files will appear on the “Files on Server” screen once your report is ready.

a. For CAPERs:

- **HMIS APR CAPER 2023 Validation file**
- **HMIS CAPER 2023 Export file**
- **HMIS APR CAPER 2023 Pre-Load file**

b. For APRs:

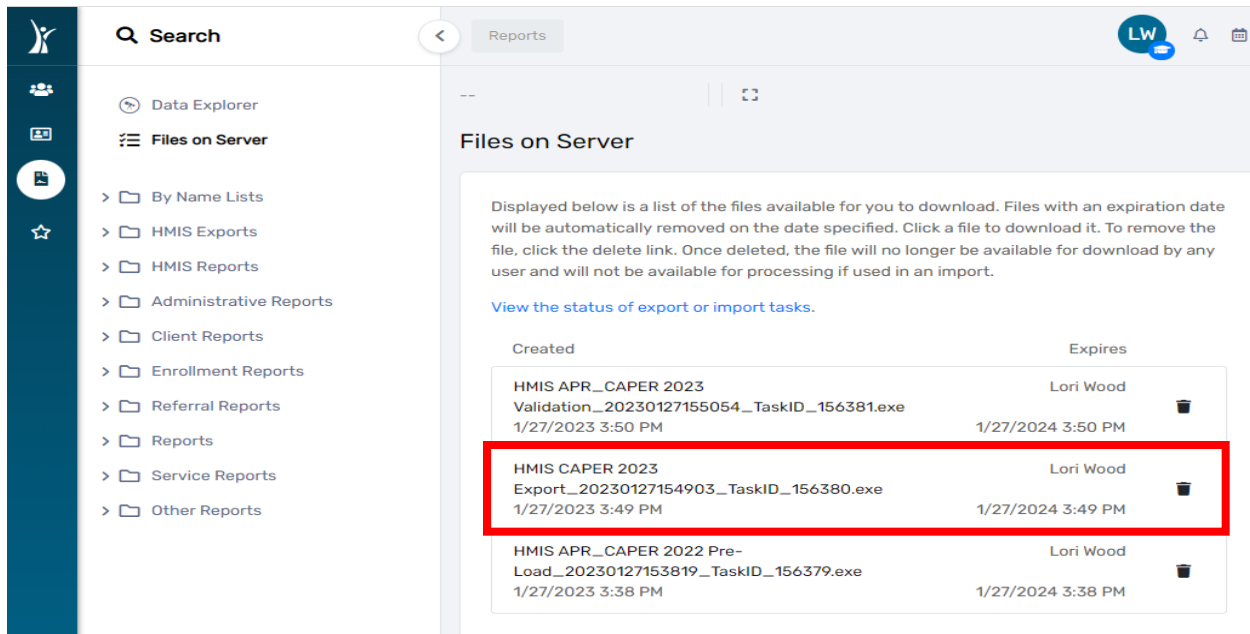
- **HMIS APR CAPER 2023 Validation file**
- **HMIS APR 2023 Export file**

HMIS APR CAPER 2023 Pre-Load file

The screenshot shows the 'Files on Server' interface. On the left is a sidebar with a search bar and a list of report categories: Data Explorer, Files on Server, By Name Lists, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, Reports, Service Reports, and Other Reports. The main area displays a list of files with columns for Created, Expires, and a delete icon. Three red arrows point to the file names in the list.

Created	Expires
HMIS APR_CAPER 2023 Validation__20230127155054_TaskID__156381.exe 1/27/2023 3:50 PM	Lori Wood 1/27/2024 3:50 PM
HMIS CAPER 2023 Export__20230127154903_TaskID__156380.exe 1/27/2023 3:49 PM	Lori Wood 1/27/2024 3:49 PM
HMIS APR_CAPER 2022 Pre-Load__20230127153819_TaskID__156379.exe 1/27/2023 3:38 PM	Lori Wood 1/27/2024 3:38 PM

9. Next, click anywhere on “HMIS APR 2023 Export” file if running an APR as shown in the image below.

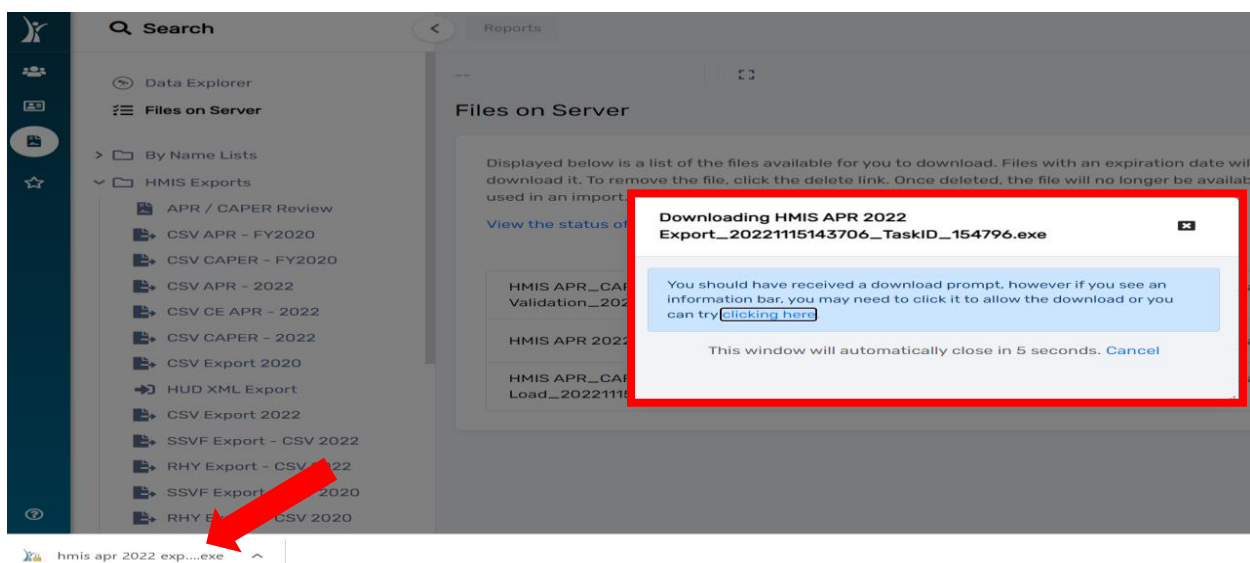


CAPER: You will download, compress, and upload the “HMIS CAPER 2023 Export” file to SAGE.

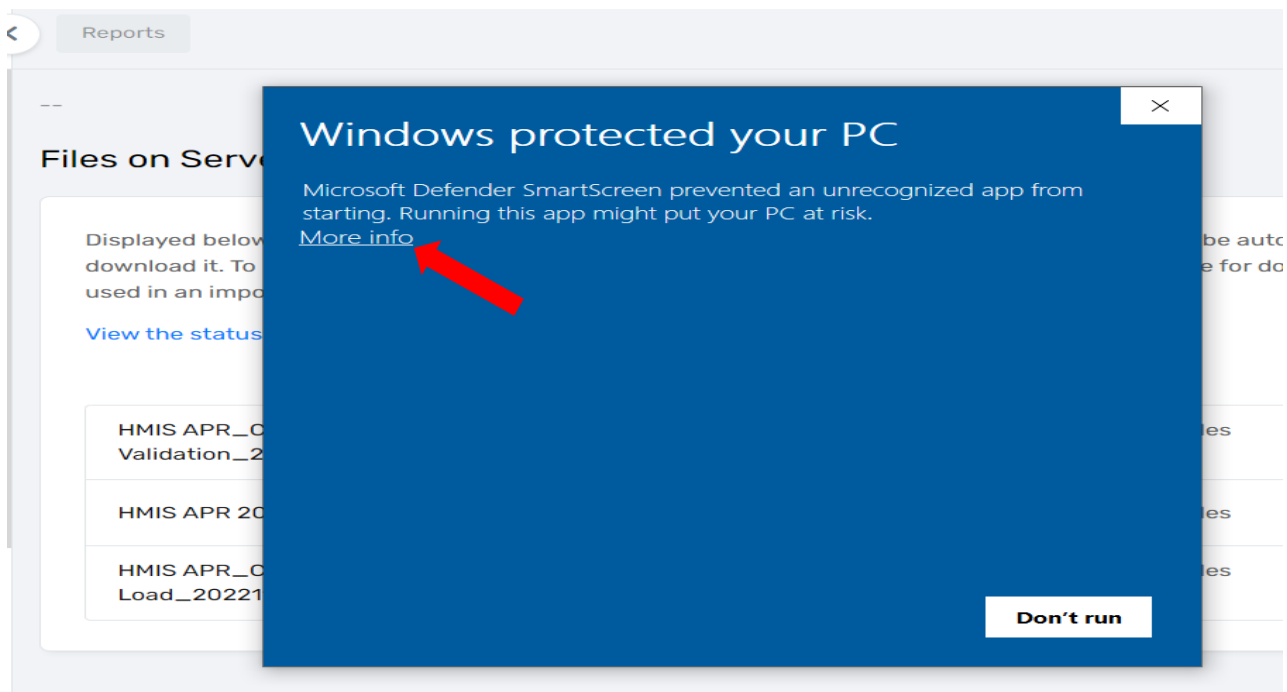
APR: You will download, compress, and upload the “HMIS APR 2023 Export” file to SAGE.

IMPORTANT NOTE: SAGE WILL NOT ACCEPT THE “VALIDATION OR PRE-LOAD” FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE “EXPORT FILE” IN SAGE.

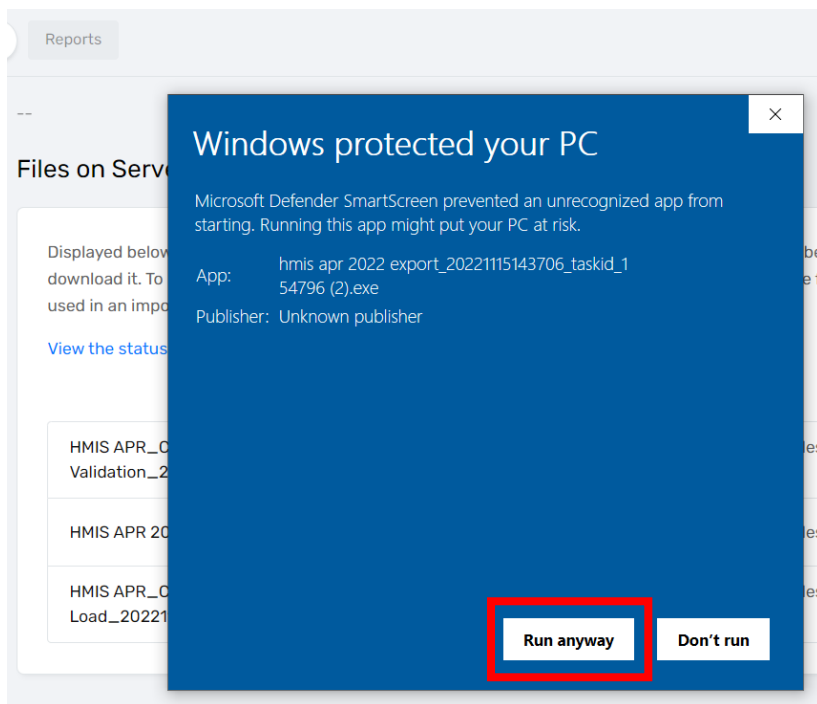
- After clicking on “HMIS APR 2023 Export” file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select “Open or Open when done” as shown below.



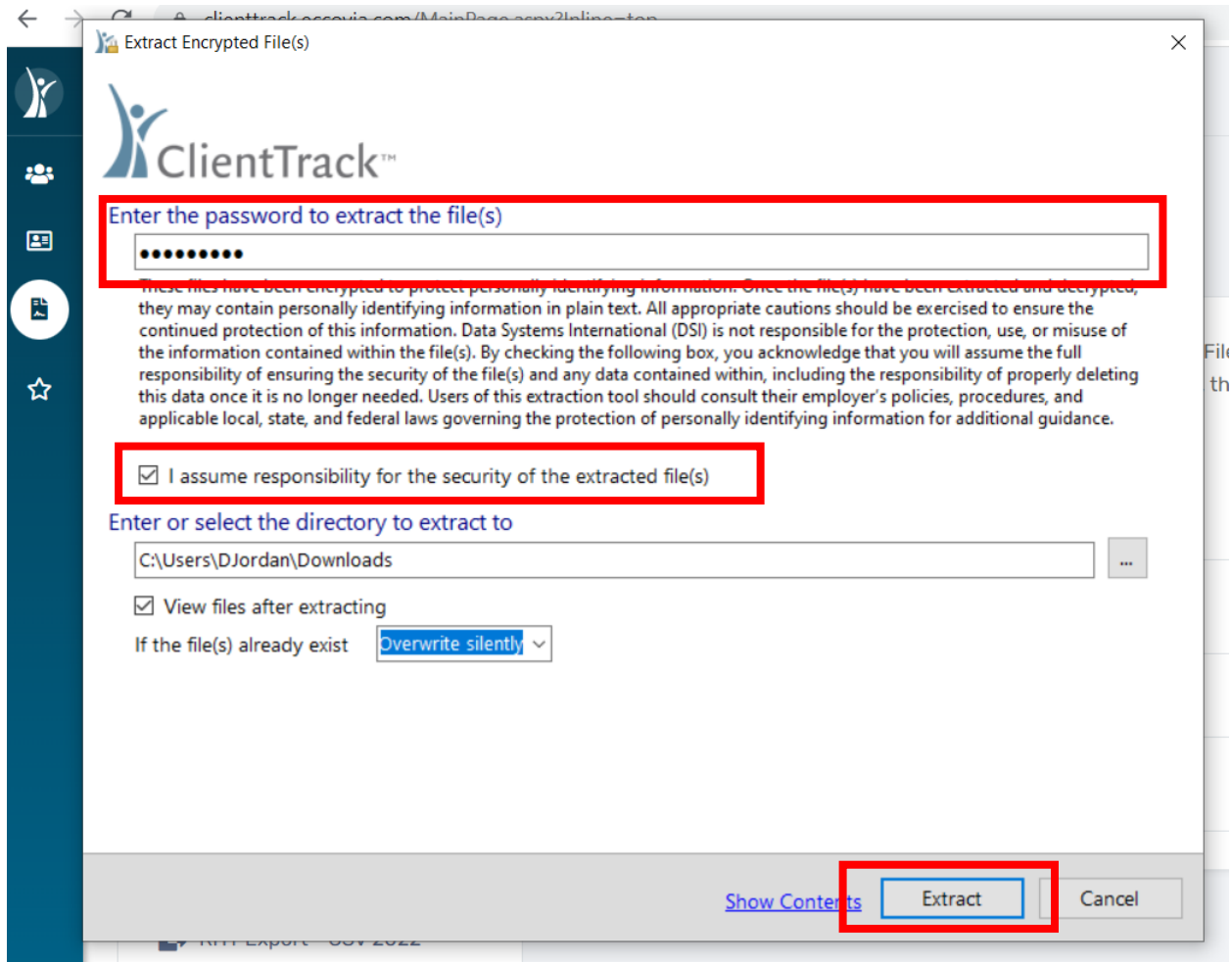
11. You may receive the message below. Please click on **“More info”**



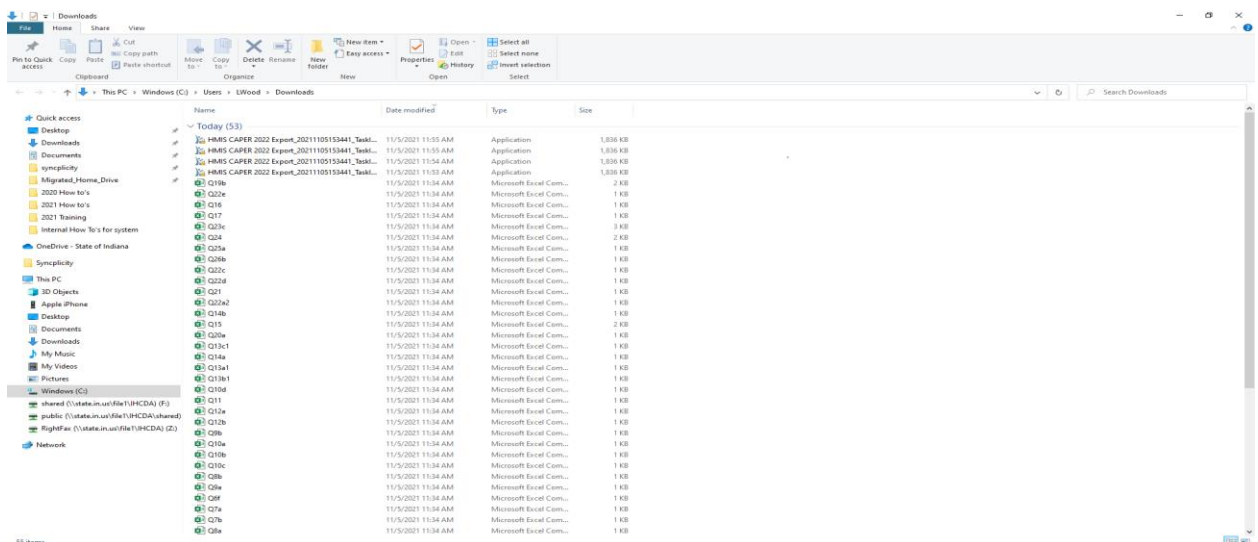
12. Next, click the **“Run anyway”** option as seen below



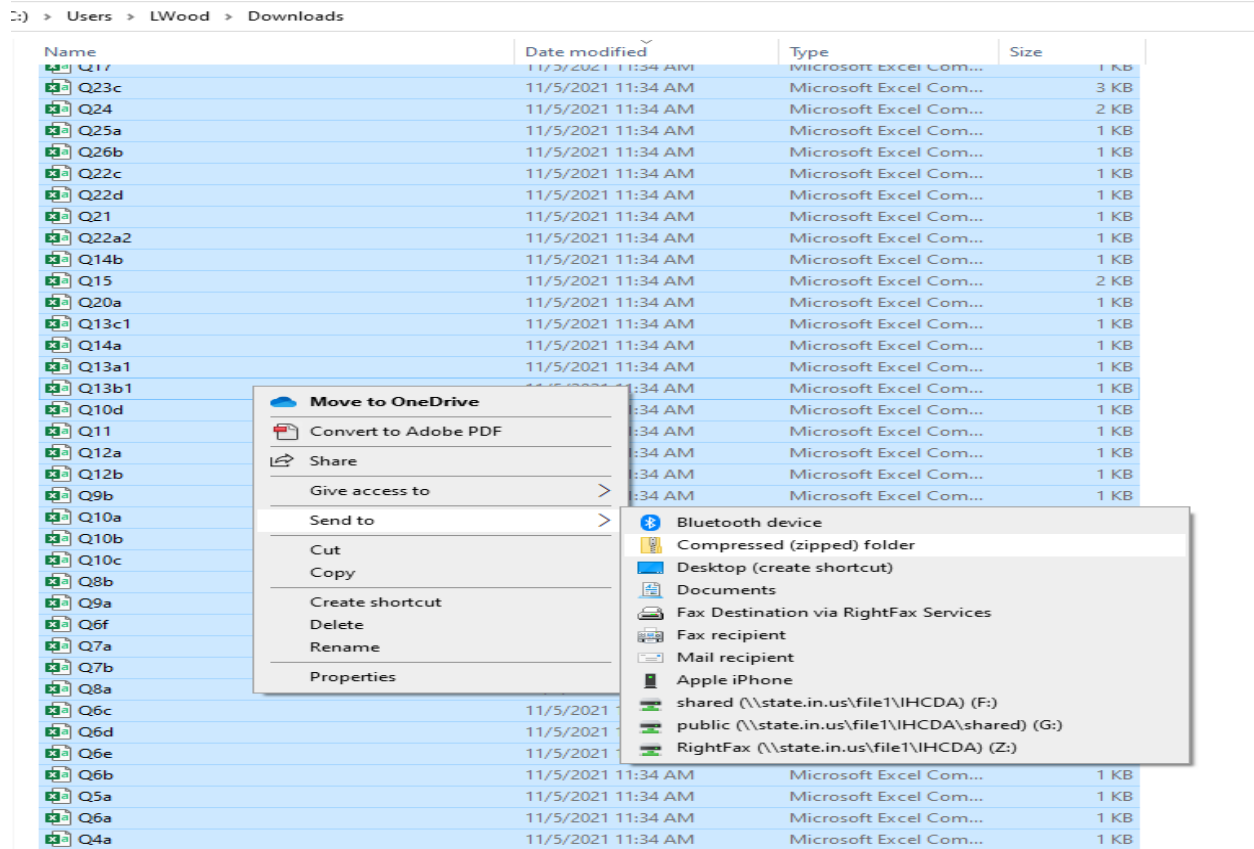
13. Enter the password you created during **Step 4** of this guide, click the check box “**I assume responsibility for the security of the extracted file(s)**”, then select “**Extract**”



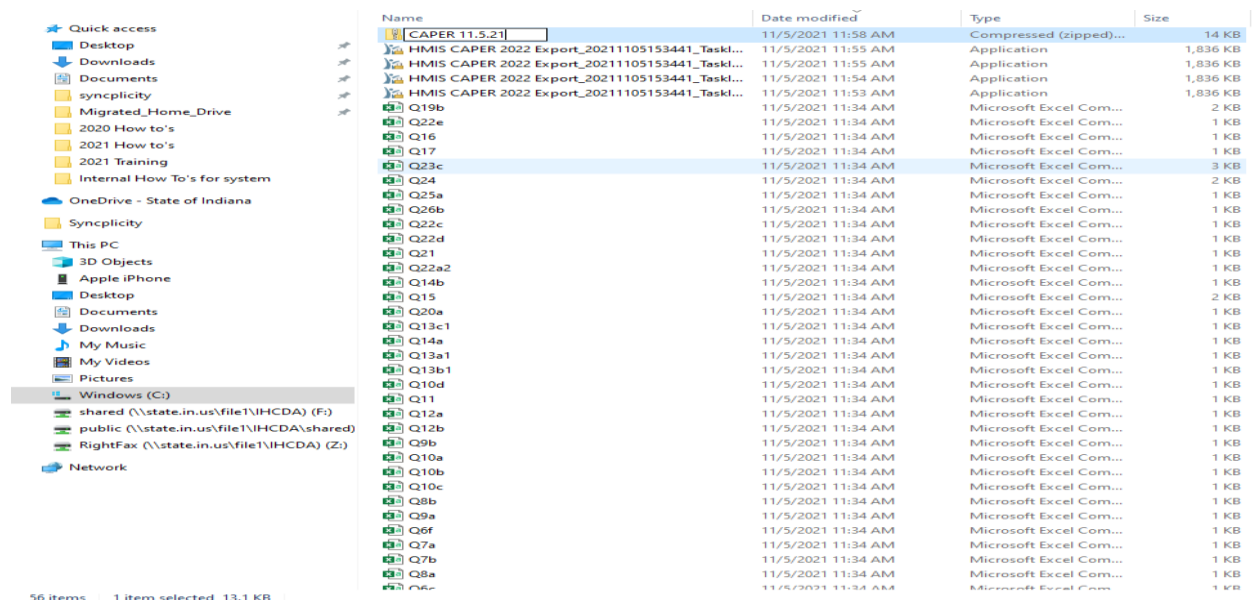
14. The files will download to your computer as seen below.



15. Click on the first “Q” file and hold down the shift key while using your “arrow down” key to highlight all the “Q” labeled report files. Next, right click and select the “Send to” “Compressed (zipped) folder”



16. The “zipped” folder will appear on your screen. Enter the name of your report for the “zipped” folder.



17. Next, delete the individual “Q” files still showing in the “download” files on your computer. You only need to keep the “zipped” folder for upload to SAGE.

Name	Date modified	Type	Size
Q17	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q23c	11/5/2021 11:34 AM	Microsoft Excel Com...	3 KB
Q24	11/5/2021 11:34 AM	Microsoft Excel Com...	2 KB
Q25a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q26b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q22c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
<div> <div>Move to OneDrive</div> <div>Convert to Adobe PDF</div> <div>Share</div> <div>Give access to ></div> <div>Send to ></div> <div>Cut</div> <div>Copy</div> <div>Create shortcut</div> <div>Delete</div> <div>Rename</div> <div>Properties</div> </div>	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
	11/5/2021 11:34 AM	Microsoft Excel Com...	2 KB
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	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q10c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q8b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q9a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6f	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q7a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q7b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q8a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6c	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6d	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6e	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6b	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q5a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q6a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB
Q4a	11/5/2021 11:34 AM	Microsoft Excel Com...	1 KB

Please email your respective helpdesk at hmishelpdesk@ihcda.in.gov or dvhelpdesk@ihcda.in.gov for further assistance.